

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

## 12. Approve a Document

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|-------------|-----------------------------------|--|
| <b>12.1</b> | <b>Introduction</b>               | This procedure describes the process to approve/disapprove a document routed through the approval routing process. The data is entered via the CSPS “Documents Requiring Approval Screen” (WF002).   |
| <b>12.2</b> | <b>Who Performs the Procedure</b> | Individuals such as budget officials, line office members, and in the case of purchase orders, contracting officers are identified as approvers through the “Document Approval Maintenance Screen” (WF001). These individuals are responsible for reviewing and approving purchase requests, purchase orders, modifications to purchase requests and purchase orders and, in some cases, BPA Calls.  |
| <b>12.3</b> | <b>Initiating the Process</b>     | <p>The process begins when a document is entered into CSPS, approved by the requisitioner or buyer, and then routed for final approval. Once this process has begun, no further changes can be made to the document. If the document needs to reviewed or changed, the document review routing functionality should be used prior to beginning the approval process. See Section 2.5 - “Entering a Requisition ” Step 43 for more information.</p> <p>The system will route the document to the designated approver based on the setup in WF001. The selected employee in the User Defined Field will serve as the approving official.</p> |
| <b>12.4</b> | <b>Accessing the System</b>       | From the Main Menu, select Transaction. From the Transaction menu, select Admin. From the Admin menu, select “WF002 - Doc Requiring Approval”. Follow the steps below for WF002.   |

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- 12.5 Approving a Document** This procedure describes the steps necessary to approve any document once it appears on the approver's WF002 screen.

*WF002 - Documents Requiring Approval*

NOTES	APVD	DOCUMENT TYPE	DOCUMENT NUMBER	TOTAL	DATE REQUESTED	REQUESTED BY
		PO	736	\$17,540.00	29-JAN-1999	M Z GROW
		PO	775	\$500.00	02-FEB-1999	J L RORSTROM LEE
		PO	819	\$500.00	02-FEB-1999	L SCHLENKER
		PO	821	\$500.00	02-FEB-1999	J L RORSTROM LEE
		PO	890	\$19,990.00	05-FEB-1999	J L SPARGER
		POREQ	182	\$400.00	26-JAN-1999	J L RORSTROM LEE
		POREQ	329	\$500.00	29-JAN-1999	J L RORSTROM LEE
		POREQ	343	\$250.00	01-FEB-1999	J L RORSTROM LEE

STEP	ACTION
1.	Place the cursor on a document to be approved/disapproved.
2.	<p>Double click on a <b>DOCUMENT NUMBER</b> to view a document in read-only mode. The applicable screen will appear, (i.e., either FM030/FM014/FM041) and all data will be displayed.</p> <p>Note: Documents are sorted according to <b>DOCUMENT TYPE</b>.</p>
3.	Click the "Exit" icon in the toolbar or the "PREV" button to return to the WF002 screen.
4.	Click the <b>APVD</b> drop-down menu and select 'Yes' to approve the document or 'No' to disapprove the document.

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STEP	ACTION
5.	<p>In the NOTE field, enter up to a 240-character note or comment about the document.</p> <p>Note: This field is mandatory if 'No' was entered in the APVD field.</p>
6.	<p>Click the "Save" icon on the toolbar to commit the approval/disapproval. Once the "Save" icon is clicked, the document will disappear from the screen.</p>
7.	<p>Click the "Exit" icon on the toolbar to exit this screen.</p>